PHILIP MORRIS U.S.A.

INTER-OFFICE CORRESPONDENCE

120 PARK AVENUE, NEW YORK, N.Y. 10017-5592

TO: Arthur Goldfarb

DATE: March 20, 1991

FROM: Marketing Information & Analysis/Camille Abbruscato

SUBJECT: Cambridge & Alpine January 1991 Nielsen Update

The attached report reviews the performance of Cambridge and Alpine and their segments by Region, trade class and Section according to January New Nielsen data.

The brands' performance according to share change (3mm) versus a year ago reveals:

CAMBRIDGE

- Region 5 experienced the largest share gains, primarily attributed to significant growth in supermarkets and Section 52 (Denver). Region 4 (particularly in drug outlets) continues to be the poorest, with Sections 43 (Chicago) experiencing significant declines. However, note that total price value is exhibiting the least amount of growth in this Region and trade class.

- Likely the result of Cambridge's heightened carton promotions, the brand's share growth in supermarkets has doubled for the past three months (+0.4 vs +0.2). Doral also exhibits share increases in this trade class (aided by carton coupons), but to a larger extent (+1.2).

ALPINE

- Alpine's strongest share growth is in Region 1 (grocery outlets), predominantly in Section 16 (Philadelphia). Note that this is a recent development for Alpine since Region 3 (drug outlets) continues to represent an area of growth on a long term basis.

- Regions 4 and 5 witnessed the greatest share losses, particularly in convenience and drug stores, while geographically, Section 51 (Seattle) is exhibiting the largest declines.

- Carton outlets (supermarkets) continue to be a source of strength for Alpine (likely the result of the brand's heightened carton promotions). Share in drug stores is also growing; however, Alpine's share in convenience stores is declining. Given the apparent benefits from the brand's carton promotions, it seems possible that the reduction in pack promotions for Alpine may contributing to the brand's current decline in these stores.

2049035694

Source: https://www.industrydocuments.ucsf.edu/docs/snxm0004

A brief summary has been attached detailing stand-out geographies/trade classes.

CAMBNIEL.DOC

cc: R. Anise
D. Beran
D. Dangoor
S. Fuller
A. Goldfarb
M. Mahan
M. Moore
T. Saloun
A. Sinha
R. Tomei

2049035695

Source: https://www.industrydocuments.ucsf.edu/docs/snxm0004